Quick Reference Guide 4

Outlook 2010 for Windows
View Customizations

Outlook Pre-defined Views

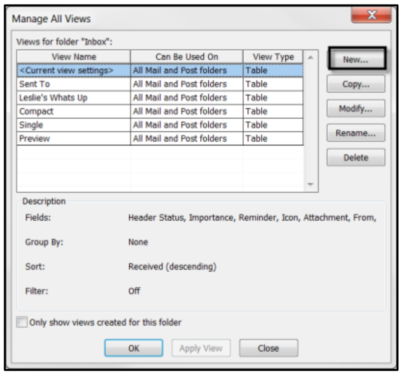
Each folder has its own pre-defined view options. Below is a table of the views available for each folder type:

Folder	Views
Mail	Sent To, Compact, Single and Preview
Calendar	Calendar, Preview, List and Archive
Contacts	Business Card, Card, Phone and List
Tasks	Detailed, Simple List, To-Do List, Prioritized, Active, Completed, Today, Next 7 Days, Overdue and Assigned
Notes	Icon, List and Last 7 Days

Apply a Pre-defined View

1. Display the desired folder in the *Content Area* and click **View Tab | Change View**. A *drop-down menu* displays.
2. Select from the options for each folder type. See table above.

Create a New View



Views for folder "Inbox":

View Name	Can Be Used On	View Type
<Current view settings>	All Mail and Post folders	Table
Sent To	All Mail and Post folders	Table
Leslie's Whats Up	All Mail and Post folders	Table
Compact	All Mail and Post folders	Table
Single	All Mail and Post folders	Table
Preview	All Mail and Post folders	Table

Description

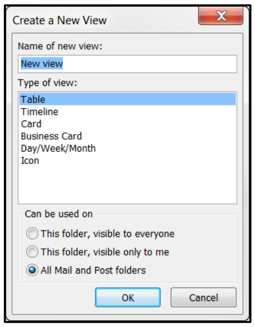
Fields: Header Status, Importance, Reminder, Icon, Attachment, From,

Group By: None

Sort: Received (descending)

Filter: Off

☐ Only show views created for this folder



Name of new view: New view

Type of view:
Table
Timeline
Card
Business Card
Day/Week/Month
Icon

Can be used on
○ This folder, visible to everyone
○ This folder, visible only to me
● All Mail and Post folders

1. Display the folder for which you would like to create a new view. Click **View Tab | Change View**. *A drop-down menu* will display.
2. Click **Manage All Views.** The *Manage All Views* dialog box (shown near right) will display.
3. Click **New.** The *Create a New View* dialog box will display (shown far right).
4. Type a name for the view in the **Name of new view** field.
5. Click to select the **Type of view** from the list provided.
6. Select how the view can be used from the options **This folder, visible to everyone, This folder, visible only to me,** or **All Mail and Post folders.**
7. Click **OK.** The *Advanced View Settings* dialog box then displays to enable you to customize the view.

Follow the steps in the section Customize a View to select specific customizations for the new view.

Customize a View

As each folder has different view options (discussed above), the customizations that can be made to a **Calendar** view are different from those available for a **Mail** view. The following examples show the steps to customize a **Mail** View.

1. Click **View Tab** | **Change Views | Manage Views.** The *Manage All Views* dialog box will display (shown above).
2. In the **Views for folder** list, select the view to be edited and click **Modify**. *The Advanced View Settings* dialog box will display with buttons to modify **Columns**, **Group By**, **Sort**, **Filter**, **Other Settings**, **Conditional Formatting**, and options to **Format Columns**.

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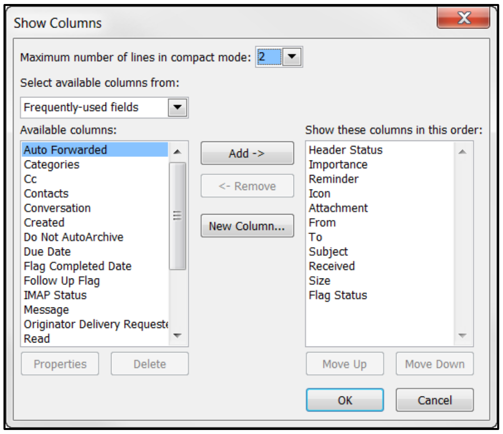
Modifying which Columns Display

1. From the *Advanced View Settings* dialog box, click **Columns**. The *Show Columns* dialog box (shown right) will display with the most frequently-used fields available.
2. In the **Select available columns from** field, click the **field drop-down arrow** and select the applicable category of fields to choose from.
3. In the **Available columns** list, click to select the column and click **Add.** The new field will display in the **Show these columns in this order** list.
   a. Click **Move Up** or **Move Down** to change the order.
   b. To delete a column, click to select it in the **Show these columns in this order** list and click **Remove.**
4. When finished editing, click **OK.** Your screen will return to the *Advanced View Settings* dialog box.


Show Columns

Maximum number of lines in compact mode: 2

Select available columns from: Frequently-used fields

Available columns:
Auto Forwarded
Categories
Cc
Contacts
Conversation
Created
Do Not AutoArchive
Due Date
Flag Completed Date
Follow Up Flag
IMAP Status
Message
Originator Delivery Requeste
Read

Show these columns in this order:
Header Status
Importance
Reminder
Icon
Attachment
From
To
Subject
Received
Size
Flag Status

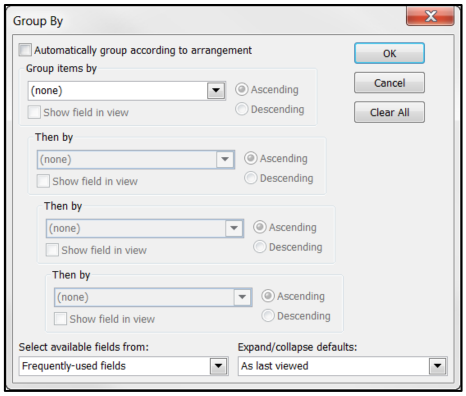
Modifying the Group By Options

1. From the *Advanced View Settings* dialog box, click **Group By.** The *Group By* dialog box will display (shown right).
2. For Outlook behavior to automatically group according to the selected arrangement, click to select the checkbox **Automatically group according to arrangement**.
3. In the **Group items by** field, click **the drop-down arrow** and select the primary group by field. Click to select either **Ascending** or **Descending** order.

*If grouping by multiple items, follow the same instructions for the additional three "group by" levels in the **Then by** drop-down field lists.*

- Click **Clear All** to remove the **Group By** setting.
- Click the **drop-down arrow** to display the options for **Expand/collapse default. Select All expanded, All collapsed** or **As last viewed.**

4. When finished, click **OK.** Your screen will return to the *Advanced View Settings* dialog box.


Group By

☐ Automatically group according to arrangement

Group items by: (none) ● Ascending ○ Descending ☐ Show field in view

Then by: (none) ● Ascending ○ Descending ☐ Show field in view

Then by: (none) ● Ascending ○ Descending ☐ Show field in view

Then by: (none) ● Ascending ○ Descending ☐ Show field in view

Select available fields from: Frequently-used fields

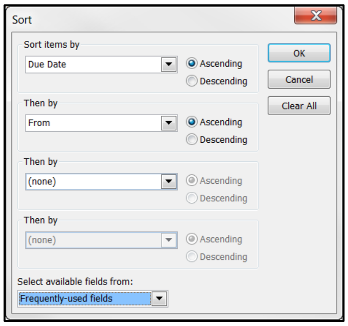
Expand/collapse defaults: As last viewed

Modifying the Sort Options

1. From the *Advanced View Settings* dialog box, click **Sort.** The *Sort* dialog box will display (shown right).
2. In the **Sort items by** and **Then by** fields, click the **drop-down arrow** and select the appropriate sort fields.
3. Click to select either **Ascending** or **Descending** order.

*By default, the **Select available fields** from drop-down list is set to Frequently-used fields. Click the drop-down arrow to select a different field set.*

4. When finished, click **OK.** Your screen will return to the *Advanced View Settings* dialog box.


Sort

Sort items by: Due Date ● Ascending ○ Descending

Then by: From ● Ascending ○ Descending

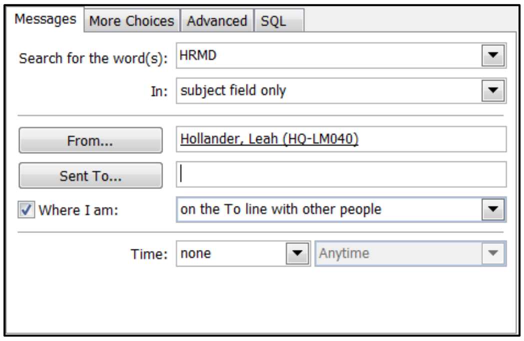
Then by: (none) ● Ascending ○ Descending

Then by: (none) ● Ascending ○ Descending

Select available fields from: Frequently-used fields

Modifying the Filter Options

1. From the *Advanced View Settings* dialog box, click **Filter**. The *Filter* dialog box will display.
2. On the **Messages Tab** (shown right), enter your search criteria:
    - In the **Search for the word(s) field**, type the search keyword(s).
    - In the **In field,** select **subject field only** or **subject field and message body.**
    - Click **From** to select the sender from either the Outlook address book or your personal contacts. You can select multiple people.
    - Click **Sent To** and select the recipient from either the Outlook address book or your personal contacts. You can select multiple people.
    - Click the **Where I am checkbox** to enable the field, and click the **drop-down arrow** to select the only person on the **To line, on the To line with other people,** or **on the CC line with other people**.
    - Click the **Time drop-down** arrow to select from the list provided. Options include the **time received, sent, due, expires, created** or **modified.**
    - Once a time criteria has been designated, click the **drop-down** arrow in the next field to select from the **list** provided. Options include **Anytime, Yesterday, Today, in the last 7 days, Last/This week,** or **Last/This Month**.



Search for the word(s): HRMD

In: subject field only

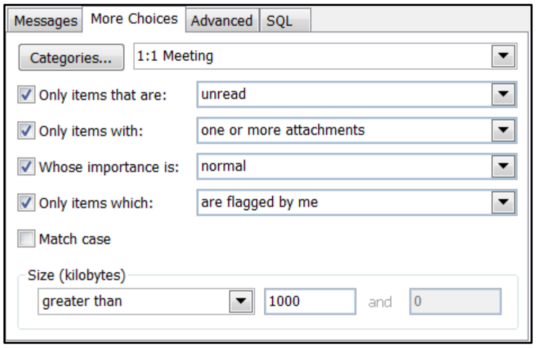
From...: Hollander, Leah (HQ-LM040)

Sent To...:

☑ Where I am: on the To line with other people

Time: none Anytime

3. On the **More Choices Tab** (shown right), click **Categories** to select a category to search by.
4. Click the **checkbox** to enable one (or more) of the following conditions as appropriate:
    - **Only items that are** either **read** or **unread.**
    - **Only items with** either **one or more attachment,** or **no attachments**.
    - Whose importance is **normal, high** or **low.**
    - **Only items which** are **marked completed, are flagged by someone else, have no flag** or **are flagged by me.**
    - In the **Size** section**,** select from the options provided and then enter **the size limitations** in the **two size fields.**



Categories...: 1:1 Meeting

☑ Only items that are: unread

☑ Only items with: one or more attachments

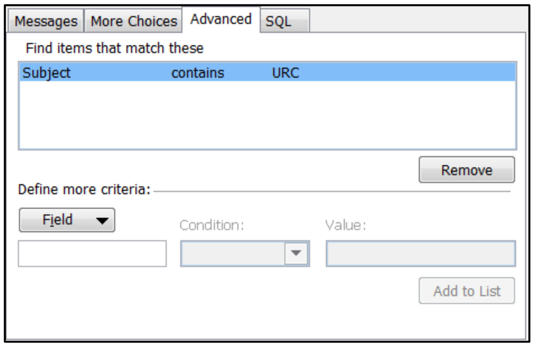
☑ Whose importance is: normal

☑ Only items which: are flagged by me

☐ Match case

Size (kilobytes): greater than 1000 and 0

5. On the **Advanced Tab** (shown right), create a conditional search using multiple search criteria as follows:
    a. Click the **Field drop-down arrow** and select the field **type** and **specific field** to search within.
    b. In the **Condition** field, select the conditional search **operator.** Options includes **contains**, **is (exactly)**, **doesn't contain**, **is empty**, and **is not empty**.
    c. In the **Value** field, enter the **text** to be searched.
    d. Click **Add to List** to add the search criteria into the list box.
    e. Follow the steps above to continue creating search criteria as appropriate.
    f. Click **Remove** to delete search criteria.

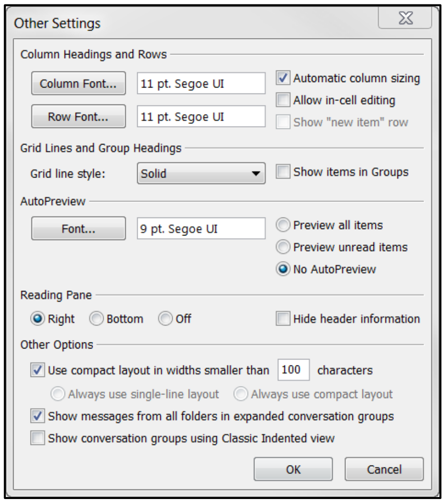


Find items that match these

Subject contains URC

6. When finished defining the filter, click **OK.** Your screen will return to the *Advanced View Settings* dialog box.

Modifying Other Settings



Column Headings and Rows
Column Font: 11 pt. Segoe UI
Row Font: 11 pt. Segoe UI
☑ Automatic column sizing
☐ Allow in-cell editing
☐ Show "new item" row

Grid Lines and Group Headings
Grid line style: Solid
☐ Show items in Groups

AutoPreview
Font: 9 pt. Segoe UI
○ Preview all items
○ Preview unread items
● No AutoPreview

Reading Pane
● Right ○ Bottom ○ Off
☐ Hide header information

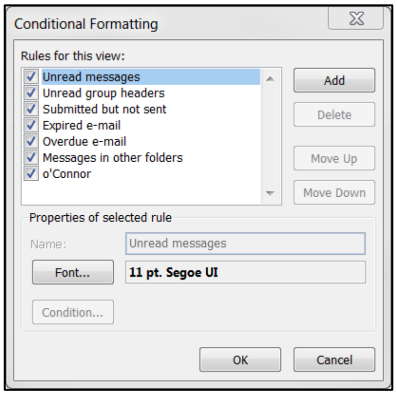
Other Options
☑ Use compact layout in widths smaller than 100 characters
○ Always use single-line layout ○ Always use compact layout
☑ Show messages from all folders in expanded conversation groups
☐ Show conversation groups using Classic Indented view

1. From the *Advanced View Settings* dialog box, click **Other Settings**. The *Other Settings* dialog box displays (shown right).
2. Use the options in the **Column Headings and Rows** section to modify how the columns and rows display:
   - Click **Column Font** to change the font attributes for the columns.
   - Click **Row Font** to change the font attributes for the rows.
   - Select the **checkbox** to enable **Automatic column sizing**.
   - Select the **checkbox** to **Allow in-cell editing**.
3. In the **Grid Lines and Group Headings** section, click the **drop-down arrow** to select from **No grid lines**, **Small dots**, **Large dots**, **Dashes** and **Solid.**
4. Click to select the checkbox **Show Items in Groups**.
5. Use the options in the **AutoPreview** section to modify the AutoPreview.
   - **C**lick **Font** to select the font for the AutoPreview display**.**
   - Click to select either **Preview all items, Preview unread items** or **No AutoPreview**.
6. Use the **Reading Pane** options to adjust the *Reading Pane* behavior.
   - Click to select the *Reading Pane* to display **Right** or **Bottom**, click **No AutoPreview** to disable.
   - Click to select the **checkbox** for **Hide header information** to display the content but not the heading of the message when viewed in the *Reading Pane*.
7. In the **Other Options** section change how conversation groups display.
   - Click **Show Messages from all folders in expanded conversation groups** to display sent, received and moved messages in the Conversation Groups.
   - Click **Show conversation groups using Classic Indented view** to display the subordinate messages indented below the original message.

Create Conditional Formatting For a View

Use conditional formatting to highlight specific messages from specific e-mail addresses so they display in a unique way in the selected view. There are many combinations of formatting conditions that can be applied. The following instructions are just one example. In this case, we will apply a specific color to e-mails from an e-mail address.

1. From the *Advanced View Settings* dialog box, click **Conditional Formatting**. The *Conditional Formatting* dialog box will display (shown right).



Rules for this view:
☑ Unread messages
☑ Unread group headers
☑ Submitted but not sent
☑ Expired e-mail
☑ Overdue e-mail
☑ Messages in other folders
☑ o'Connor

Properties of selected rule
Name: Unread messages
Font: 11 pt. Segoe UI

2. Click **Add**. A new "**untitled**" rule will display in the **Rules for this view** list.
3. Enter a title for the new rule in the **Name** field.
4. Click **Font**. The *Font* dialog box will display. Select the font color and attributes desired and click **OK**. Your screen will return to the *Conditional Formatting* dialog box.
5. Click **Condition**. The *Filter* dialog box will display. For instructions on building filter conditions, see the section entitled Modifying the Filter Options at page 3.

*For this example, click **From** and select the appropriate e-mail address from the Global Address Book, your personal address book or your personal contacts list. Click **OK**. Your screen will return to the Conditional Formatting dialog box.*

6. Ensure the new rule has a checkmark beside it in the **Rules for this view** list.
   - Deselect any rules that do not apply to this view by clicking the **checkbox.**
   - **Move Up** or **Move down** the rule by clicking the appropriate button.
7. Click **OK** three times to dismiss all dialog boxes.